

**Paying Attention to Staff is Key to Developing and
Implementing Client-Centered Priorities**

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Over a year ago the Legal Aid Foundation of Los Angeles (LAFLA) began a strategic planning process designed to examine the existing and emerging legal needs of LA's low-income communities and LAFLA's role and effectiveness in meeting those needs. On February 23, 2001 an all-staff meeting was convened to affirm and celebrate the results of that process. Some changes have already been instituted; more are to come.

One key to the success of the process and, hopefully, the ability to institutionalize the changes mandated, lies in the attention paid to the concerns, participation, and development of staff.

Context and Background

LAFLA has 120 staff members distributed throughout seven offices that encompass most of Los Angeles County. The service area includes over a million poor people—the largest poverty population of any metropolitan area in the nation. The substantive work is organized around units: housing, government benefits, immigration, employment, consumer, community economic development, family law, and a special project focusing on the Asian Pacific Islander community.

The strategic planning process was initiated in the wake of [and as a way of addressing] the loss of over a third of the staff due to LSC cuts in 1995, more than two years without a permanent, full-time executive director and the attendant loss of focus. Concurrently Welfare-to-Work, a crisis in affordable housing, and the shift of jobs from manufacturing to service increased both the number of poor people and the intensity of problems they faced.

With the hiring of a permanent executive director in 1997, the Foundation steadied its course, but staff were left with residual feelings of demoralization and the burn-out that comes from facing a crush of clients with no end in sight.

On the other hand, LAFLA had several positive things going for it: a diverse staff that reflected the ethnic makeup of the client community, a history of work with community organizations, critical mass in terms of size and number of substantive areas, an executive director and board of directors invested in change, and a core of leaders who had deep ties with staff forged through the previous years of distress.

Developing a Plan to Proceed

At the impetus of the executive director, a strategic planning committee was formed with representatives from all of the offices and practice areas. Attention was paid to including staff that were looked to as leaders by other staff whether or not they were in management. Thus, some of the most valuable contributions were made by persons active in the union. Moreover, the committee included support staff in addition to lawyers and paralegals. From the outset, the committee took the position that staff input and buy-in to the process were critical to its success. Additionally, the committee viewed staff as “experts” rather than blank slates. While they didn’t want to devise a plan based on whatever cases came through the front door, they recognized that some conclusions could be drawn from daily encounters with low-income clients. Those conclusions could be tested and adjusted in discussions with experts and community leaders from outside LAFLA.

The big question was how to get an over-worked staff to participate in the strategic planning process. The committee determined that two things would be key: (1) hearing and addressing staff concerns, and (2) using a shared decision-making model. Participation would be open to all staff, and decisions would be made by consensus of the participants.

The first step, therefore, was to survey LAFLA staff. Three separate surveys were issued to elicit staff views on (1) skill level and development, (2) management and supervision, and (3) unit functioning and client services. An analysis of the responses showed the committee that staff felt

not enough attention was being paid to training and that management needed to prioritize the development of individual staff members. A decision was made to make skill development a critical part of LAFLA's strategic plan. Several projects were undertaken in conjunction with the management team: new job descriptions and performance standards were drafted, and the evaluation process was revamped to reflect the changes; managers were trained and will receive ongoing training, and directing attorneys are creating an Individual Development Plan with each unit member. A Director of Advocacy and Training position was created and filled.

The two-fold result of these changes was to give staff better skills to take on work more efficiently and to demonstrate to staff that their input was taken seriously.

Phase Two: Bringing in Community Leaders and Experts

The second phase of the strategic planning process was constructed in light of lessons learned from past needs assessment attempts. In 1997 priority-setting was conducted by sending surveys to individual clients and judges in which they were to rate the importance of substantive areas based on perceived need, as well as by holding group meetings with community based organizations, client advisory councils, and housing project tenant associations. The results from the individual surveys did not prove to be very helpful because clients, suffering from multiple problems, identified everything as equally important. However, the group meetings yielded a wealth of information about client needs.

Another useful model was extracted from a meeting suggested by a LAFLA board member with a long history in housing advocacy. Approximately twenty housing activists were invited to meet with some of LAFLA's housing advocates to discuss ways to respond to LA's affordable housing crisis.

Based on these models, the strategic planning committee decided to convene meetings organized around broadly stated themes that paralleled LAFLA's priorities:

- (1) Protect and Create Economic Opportunities
- (2) Preserve Safety, Stability, and Health
- (3) Protect Human and Civil Rights and Privileges

Invitations would be extended to community “experts,” that is, academics, representatives of government agencies, representatives of grass roots community based organizations made up of and serving clients, educators, and community activists—persons identified by staff as having expertise in legal, social, and economic issues affecting our broad client communities. It was hoped that the theme meetings would inform, energize, and update staff on emerging client needs and stimulate the critical thinking necessary to forge solutions.

The plan to conduct theme meetings was launched at an all-staff meeting in February, 2000. Staff were encouraged to sign up for one of three committees, each charged with putting together a theme meeting on one of the broad topics. Because LAFLA’s size and geographical spread make all-staff meetings a rare event, holding such a gathering underscored the importance of the strategic planning process and emphasized the commitment of management to implement recommendations coming out of the process. Speakers reiterated the need for staff participation and explained the shared decision making process. In fact, some changes to the process were adopted during the meeting itself, by a vote of the staff present. Every member of the strategic planning committee played a role in the presentation, so it was clear that some of the Foundation’s key leaders were behind the strategic planning process.

Most advocates participated in one or more of the three theme committees. Some support and administrative staff also participated. Each committee chose resource people and handled the logistics of holding their theme meeting. Staff members suggested participants and the committee as a whole decided on the final mix of speakers. Here LAFLA’s history of work and ties within LA’s low-income communities, as well as the diversity of staff, proved invaluable in identifying experts.

Thirty-two experts participated, ranging from representatives of community based organizations, community activists, a school principal, an elementary school teacher, tenant leaders, labor organizers, to government agency officials and professors. Each participant made a statement about their view of the pressing needs of LA's poor communities, what could be done generally to address those needs, and specifically, what LAFLA could do. Staff interacted at every point.

An outside facilitator¹ ran each meeting, so that all LAFLA staff could participate, and the meetings would move smoothly with a process for regular summing up.

Back to Staff

After each of the three theme meetings had taken place, the theme committees reconvened to consider these questions:

- (1) What are the most important issues for LAFLA to address given the needs assessment coming out of these meetings?
- (2) What work do we now do to address these needs?
- (3) What more would we need to do to address newly-identified needs? Would there be work areas scaled back or cut? Would there be areas expanded or focused?

and produce written recommendations.

One overriding concern came to the fore: the violation of human and civil rights—the daily experience of disrespect shown to poor people by governmental agency workers, inferior schools, unpaid wages, police harassment and treating minority youth as criminals—has become normalized in Los Angeles. The link between racism and poverty was demonstrated by speaker after speaker.

Committee members summed up that in addition to learning about client and community needs, they had learned that LAFLA is important to the community and many of the outside

¹ We used John Arango of Algodones Associates, Debby Cantrell, Executive Director of the Western Center on Law and Poverty, and John Tull of John A. Tull and Associates.

participants wanted to increase collaborative efforts. Some staff learned for the first time about the work of other units in the Foundation.

Proposals

Proposals produced by the theme committees in conjunction with the strategic planning committee and directing attorneys can be grouped into the following areas:

I. INTERNAL COLLABORATION AND COMMUNICATION

- (a) Create a client-centered intake system through an issue-spotting check list
- (b) Share intake procedures and protocols for each unit
- (c) Develop task forces to focus on cross-unit issues
 - (1) child care
 - (2) child support
 - (3) job development
 - (4) discrimination – develop a plan to address discrimination in housing, banking, insurance and financial services, education, employment, transportation, and distribution of resources
- (d) Strengthen internal communication and staff competency
 - (1) issue regular advocacy reports
 - (2) develop an intranet to share briefs, etc.
 - (3) create an internal newsletter
 - (4) conduct regular meetings of screeners and receptionists
 - (5) train all staff in the basics of each substantive area

II. COMMUNITY COLLABORATION AND EDUCATION

- (a) Partner with community-based organizations to provide effective community education
[3 pilot projects: public housing, labor organization, school]

- (b) Create teams of lay advocates to assess, refer, and/or handle simple legal problems
- (c) Improve efforts to publicize our client stories in ways that impact policy
- (d) Use the media for community education

III. SUBSTANTIVE

- (a) Housing—shift significant resources from eviction defense to other housing work, including rent control, slum abatement, subsidized housing and improving housing stock
- (b) Consumer/Community Economic Development—create a working group to look into banking, financial and insurance services, meet with banking advocacy organizations with the goal of developing or improving banking and financial services for low-income communities and developing or improving affordable insurance options for homeowners, car-dependent workers and minority businesses
- (c) Welfare Advocacy—assess and plan the level of direct client service, policy work and impact litigation
- (d) Family Law Advocacy—improve the relationship to and reputation with outside social service agencies and domestic violence shelters; create an interdisciplinary work group to discuss cross-over issues, develop referral protocols, and create better ways of communicating; designate period for all advocates to discuss increasing impact and policy work

Summary

Staff have come out of the strategic planning process energized and—because their needs were taken into account and they shared in the decision-making process—with a feeling of ownership in the process and its results. Strategic planning committee members will continue to meet, monitoring progress, eliciting staff concerns, publicizing victories—in short, ensuring that LAFLA maintains a critical and innovative approach to its work.